

For customers

Change to product details

This form can be used to make changes to any of your products. If you want to make changes to different products please complete separate forms for each.

You can't use this form to make changes to Aegon Ireland Wealth Management Portfolio (WMP). If you want to make changes to WMP please contact your adviser.

If you'd like to change your personal details please complete the Change of investor details form.

Once completed, email this form and any additional information to clientsupport@arc.aegon.co.uk

Our email system and the way we deal with data is internally secure. However, we're unable to ensure the security of emails before they reach us. Please consider this when sending us sensitive information.

Important note

Important note: If your pension has been upgraded by Aegon to an Aegon Retirement Choices Self Invested Personal Pension (ARC SIPP) and you go ahead with this transaction, we'll view this as your agreement to the transfer of your former Aegon pension plan to this ARC SIPP.

This means:

- a. If waiver of contribution insurance cover is required it will have to be taken out with another provider, and will be subject to underwriting and payment of an additional premium, as this option isn't available with an ARC SIPP.
- b. We won't allow a return to your former pension plan.

You can find more information on our customer returns policy at aegon.co.uk/modernpension

By submitting this form you are confirming your agreement to the upgrade.

1. Product details

Please complete this form in BLOCK CAPITALS and in ballpoint pen.

What product type and number should we apply the changes to?

Investor number

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Product wrapper name

Wrapper Number

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Investor name(s) as currently recorded with us

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Address as currently recorded with us

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| |
| Postcode |

2. Bank details for payments out or income

Please provide details of the bank/building society current account the income or payment is to be paid into. If you're making a payment to a third party, we'll need a certified copy of a bank statement for the third party account before payment can be made.

If the change(s) you're making affect your existing Direct Debit instructions and you've a regular investment in place, please complete a Direct Debit instruction for each of your products.

Name of bank/building society

Account name

Address

| |
|----------------------|
| <input type="text"/> |
| <input type="text"/> |
| <input type="text"/> |
| Postcode |

Branch sort code

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Account number

Building society reference number

3. Regular investments

You should complete this section if you want to cancel or change a regular investment being made to your existing investment choice. If you want to start regular investments you should complete a new investment application for the appropriate product. The regular investment instructions on this application will replace any previous instruction.

Investor regular investment

Cancel my existing investor regular investment

or

Change my existing investor regular investment

£ (net*)

All regular investments will be paid monthly.

or for ISA only

Maximum allowed for remainder of this tax year

Do you want to increase your regular payments each year? Please select one option.

No

Yes – by the Retail Prices Index (RPI)

Employer regular investment (pension plan only)

Please make sure that your employer completes a Record of payments due form for any changes to an individual SIPP.

Cancel the existing employer regular investment

Third party regular investment (pension plan only)

Cancel the existing investor regular investment

or

Change the existing investor regular investment

£ (net*)

All regular investments will be paid monthly.

Do you want to increase your regular payments each year? Please select one option

No

Yes – by the Retail Prices Index (RPI)

*For the pension plan, we'll reclaim the basic tax rate on this amount, which will be invested in accordance with the Aegon Terms and Conditions.

4. Regular withdrawals

You should complete this section if you'd like to start regular withdrawals or change an existing regular withdrawal instruction. Withdrawals from the pension plan must be made using the Benefits crystallisation event form.

Amount* (to a maximum of 10% each year of wrapper value)

or

(calculated as a monetary amount at the time of processing this application)

Monthly Quarterly Annually

Start date (dd/mm/yyyy)**

*Regular withdrawals have the option for fixed amount or % but not both.

**The start month can't be more than 12 months from the date of application.

Do you want to increase your regular withdrawals? Please select one option.

No increase

Increase by the Retail Prices Index (RPI)

Increase by a fixed % (1%-5% each year)

Payments will be made by us on or around the sixth business day of each month and will typically reach your account three business days later for bank accounts and up to 10 days later for building society accounts.

5. Client declaration

To the best of my knowledge and belief the information I've supplied in this form is true and complete.

Date (dd/mm/yyyy)

Print name

Signature - (Signatures not required if sending this form by email).

If you have a joint plan (only available for Aegon Retirement Choices investors) please provide signatures of all investors.

Date (dd/mm/yyyy)

Print name

Signature - (Signatures not required if sending this form by email).

Date (dd/mm/yyyy)

Print name

Signature - (Signatures not required if sending this form by email).

Date (dd/mm/yyyy)

Print name

Signature - (Signatures not required if sending this form by email).

 